

## PO Tool 6 - Purchase Order Page - Top Section

V.1.0. 03/14/2013

The purpose of this tool is to provide the **Kansas Buyer role** with an overview of the **Purchase**Order page, and its functionality in SMART.



#### **Foundation Information**

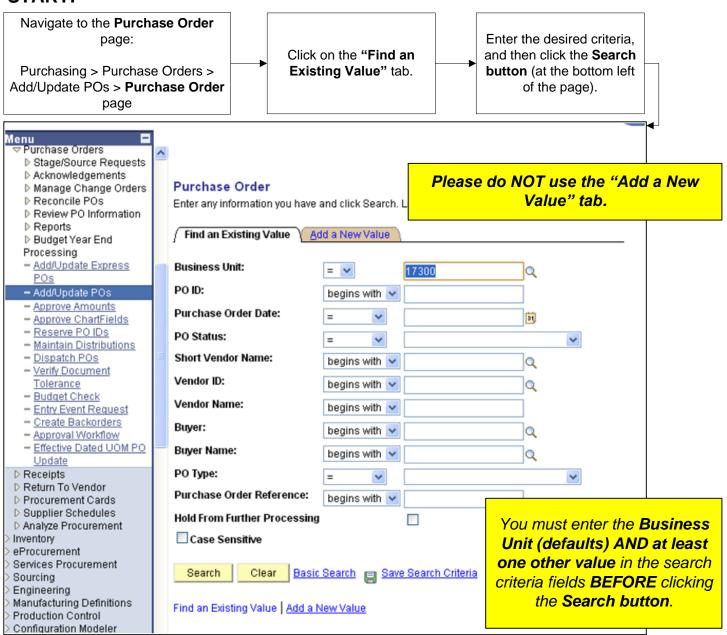
It is important to know and to understand that a Purchase Order must:

Have a **PO Status** of "**Approved**", Have a **Budget Status** of "**Valid**", AND

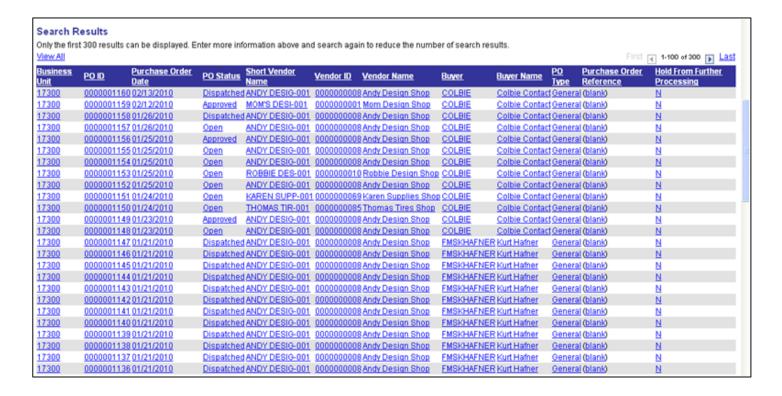
Have the 'Hold From Further Processing' checkbox unchecked

Before the Purchase Order can be "Dispatched" (sent) to the vendor.

### **START:**

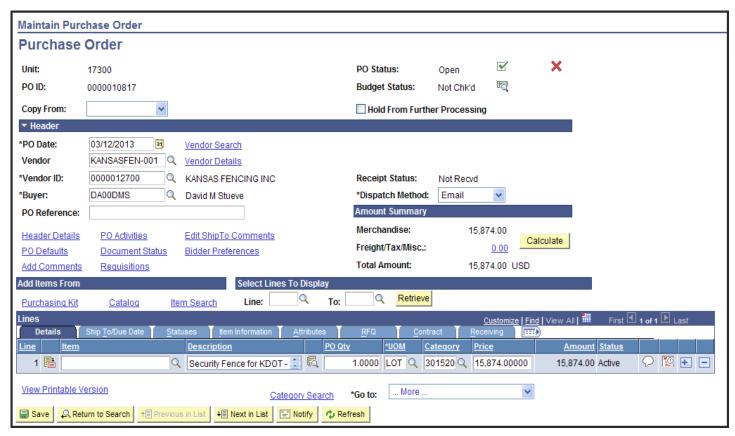


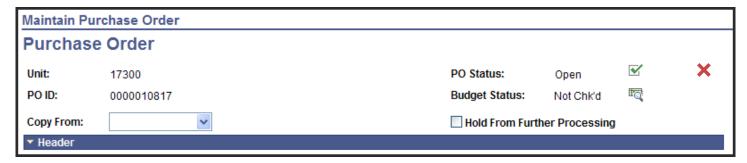
If you entered several Search Criteria, or a range of Search Criteria, your **Search Results** will be returned to you at the bottom of the page in a grid format (as shown in the screenshot below):



Select the desired result from the Search Results list by clicking on it. Clicking on a specific result will directly open the **Maintain Purchase Order – Purchase Order** page for that result.

Alternatively, if you entered a specific Purchase Order number, the **Maintain Purchase Order – Purchase Order** page will open directly (as shown in the screenshot below):





# Maintain Purchase Order - Purchase Order Page

<u>Unit:</u> Contains the five digit business unit number for the Agency in SMART (which is comprised of the 3 digit State of Kansas Agency number with two zeros at the end).

**PO ID:** Contains the ten digit Purchase Order Identification Number. This Purchase Order ID Number is assigned to the Purchase Order by SMART when the auto sourcing batch process is completed successfully.

(The Auto Sourcing batch process is an hourly batch process which selects the final 'Approved' requisitions from the e-Procurement module in SMART, and turns them into a "purchase order" in the Purchasing module of SMART).

**Copy From:** The State of Kansas is not using this functionality. *Please do <u>NOT</u> use this field*.

**PO Status:** The PO Status (Purchase Order Status) field contains the current status of the Purchase Order in SMART. There are several statuses that may be displayed in this field:

**Open:** The PO is in an 'Open' status. The PO is waiting to be reviewed, edited, and 'Approved' by the **Kansas Buyer** role.

Note: It is important to know and understand that a *Kansas Buyer* role can only <u>update</u> PO's which have been assigned to *their own Buyer ID* (which is the same as their SMART User ID). An *Agency Buying Administrator* role is able to update <u>ALL</u> PO's for their Agency.

<u>Approved:</u> The PO has been manually 'Approved' by the Kansas Buyer role. (The Kansas Buyer clicked on the *Approve PO* icon located to the right of the *PO Status* field:

). 'Approved' PO's are eligible for the Budget Checking process.

Note: The **Budget Checking batch process** runs hourly from 9:00 am – 4:00 pm, Monday – Friday on business days, and overnight as part of the nightly batch processes.

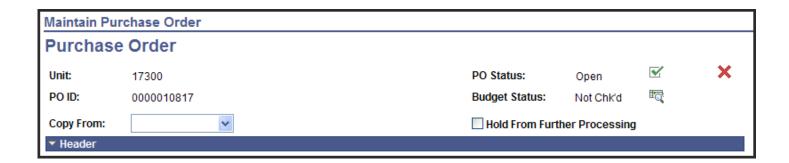
**On Hold:** The PO has been placed on a manual hold (Refer to Page 5 of this document).

**Dispatched:** A PO can only be 'Dispatched' (sent) to a Vendor when:

- The PO has been manually 'Approved' by the Kansas Buyer role.
- The Budget Checking process has successfully completed, and has a "Valid" status (i.e.: No "Error" occurred during the Budget Checking process).
- The 'On Hold' check box is **NOT** checked.

The PO Status changes to 'Dispatched' AFTER the PO has been sent to the Vendor.

**Note:** Additional information pertaining to the dispatching of PO's is contained in the 'Reviewing and Approving POs' training guide (which is currently under construction) and also in the Purchase Orders - Job Aid: 'Modifying PO Email & Fax Destinations'.



#### Maintain Purchase Order - Purchase Order Page

<u>Closed:</u> PO's may be manually 'Closed' by an **Agency Buying Administrator** role (using the PO Reconciliation Workbench).

Please refer to the Purchase Orders job aid "Manual PO Close Process" additional information.

Note: It is important to know and understand that Canceled PO's will at some point change from a header status of 'Canceled' to a header status of 'Closed'. The PO line status will indicate if the PO line was 'Canceled' or 'Closed'.

If your Agency has a PO that has been 'Closed' and needs to be re-opened, please contact your **Agency Security Liaison**. The Liaison must submit a **Service Desk request** asking for the PO to be re-opened.

<u>Cancel PO icon:</u> The **red 'X' icon** at the top right of the page is the 'Cancel PO' button. Clicking this icon prompts SMART to cancel the PO.

Note: It is important to know and understand that the cancellation of a PO CAN NOT be reversed in SMART. Therefore judicious use of this button is recommended, and only AFTER you have confirmed that the PO will NEVER need to be used again.

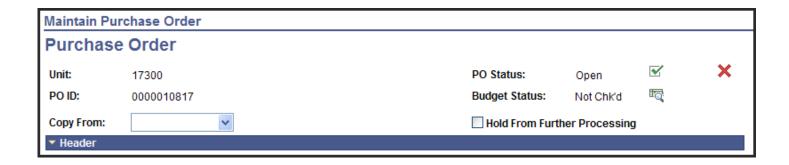
The cancellation of a PO immediately <u>releases any encumbered monies</u> and returns them to your Agency's Operating budget (using the Fund/Budget Unit/Budget Period combination contained within the Distribution lines of the PO).

<u>Budget Status</u>: The **Budget Status** field contains the current 'Budget Checking status' of the Purchase Order in SMART. There are several statuses that may be displayed in this field:

**Not Chk'd:** Indicates that the PO has not been through the budget checking process yet.

<u>Valid:</u> This budget checking status indicates that the PO has been successfully budget checked and has passed all the ChartField and Budget validations during the Budget Checking process. The PO is now eligible to be '*Dispatched*' to the Vendor.

**Error:** This budget checking status indicates that the PO has been budget checked and that one or more ChartField / Budget 'Error/s' have been identified. To view the Budget Status error/s, click the 'Error' link in the Budget Status field. These 'Error/s' must be manually resolved <u>BEFORE</u> the PO can be submitted for the budget checking process again. The PO is <u>NOT</u> eligible for 'dispatching' to the vendor until the Budget Status of 'Valid' status is achieved.



# Maintain Purchase Order - Purchase Order Page

# 'Hold From Further Processing' checkbox:

This checkbox is manually selected to place the PO on hold and to change the **PO Status** to "**On Hold**".

A PO may be put on hold at the discretion of the *Kansas Buyer* to whom the PO is assigned, by the *Agency's Buying Administrator*, or by a *Central Purchasing Officer*.

Note: It is important to know and understand that any PO with a PO Status of "On Hold", is unable to be used within SMART for any purpose.

PO's placed "*On Hold*" are prevented from entering any batch processes, including budget checking, and dispatching to the vendor. Until the PO Status of "On Hold" is manually changed, the PO will not be able to move forward within SMART; it can NOT be used on any transactions in SMART; nor can it progress through any batch processes within SMART.

To remove the "On Hold" status from a PO, simply deselect the 'Hold From Further Processing' checkbox, and 'Save' the PO.